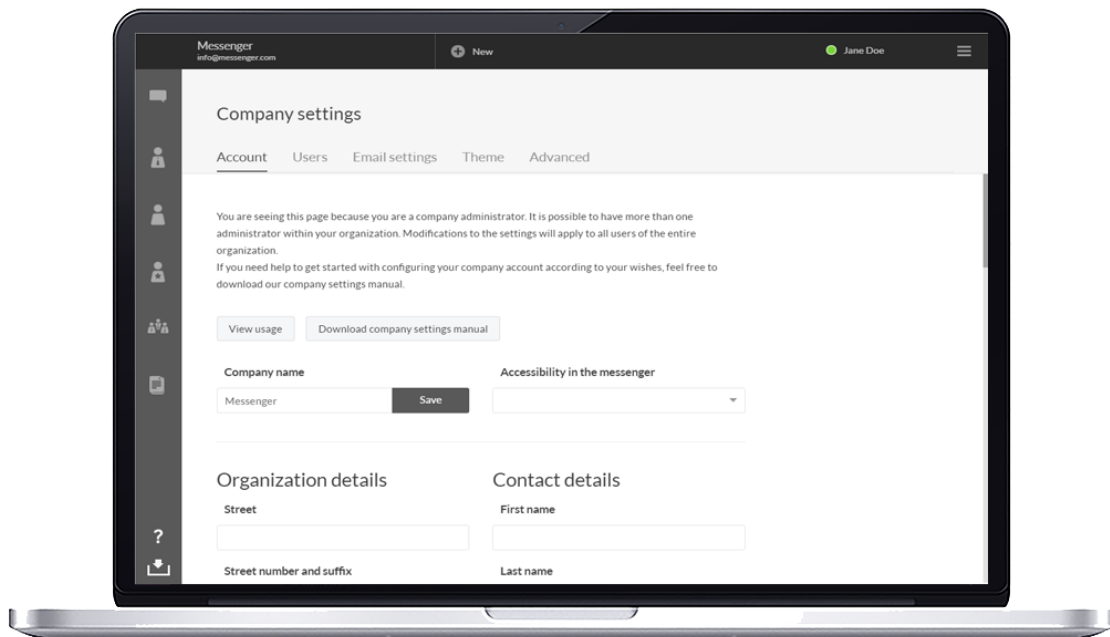# COMPANY SETTINGS

A MANUAL

Alterdesk®

Introduction

If you are the first of your organization to register for the messenger, you will automatically be the company admin. If you do not have admin rights, another company admin can promote you.

In a nutshell, this means that you:

- Can configure the (regular and advanced) messenger settings for the entire company;
- Can check and manage the users linked to your company;
- Can set the frequency of email notifications;
- Can change the theme of the messenger for your company.

In this manual we will show you how you can arrange your company account according to your wishes.

Are you the company admin but are you not supposed to or willing to fulfil this role? No worries – on the final page of this manual you can find instructions on how you can give a co-worker admin rights. This co-worker can then demote you if you wish.
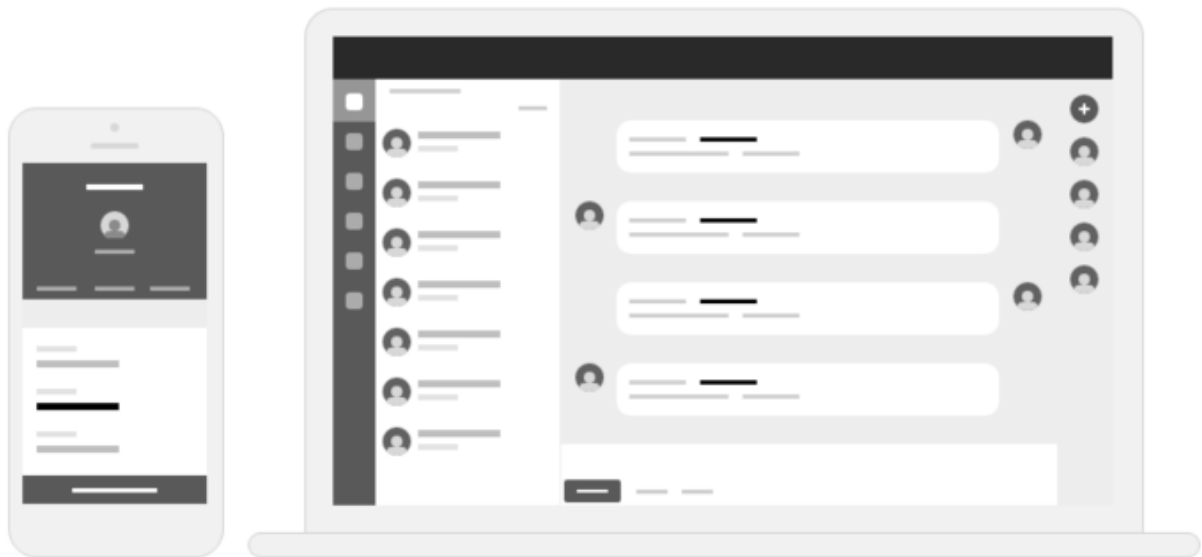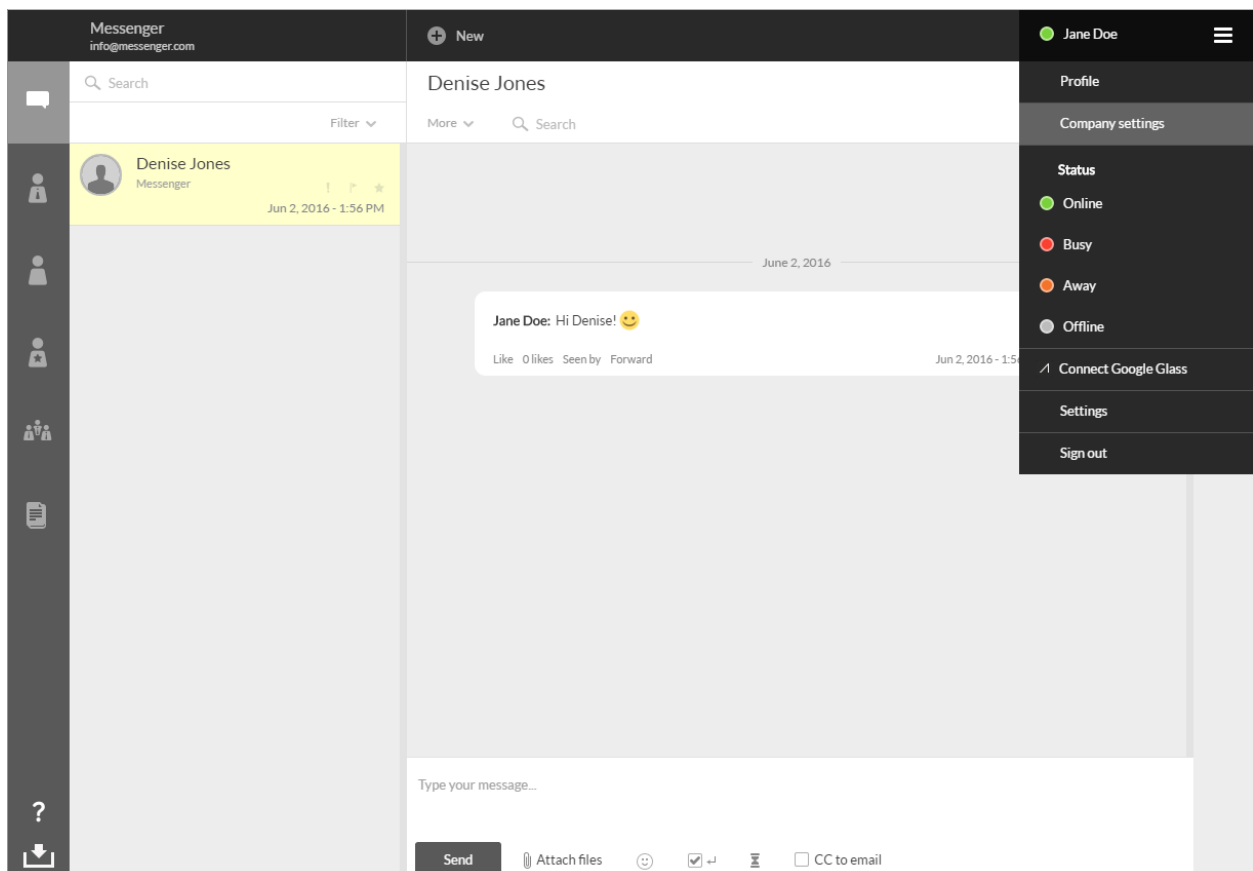
Accessing the company settings

When using one of the desktop versions of the messenger (web or native), you will find the company settings at the top right of your screen.

Click to open the dropdown menu and choose 'Company settings'.

You will then see a page with several tabs. We will discuss each tab separately. It is easiest to follow the order of this manual, so that you can be certain that you will not skip any important steps in the process.

Tabs

'Account'
Here you will find settings like the company name, the accessibility of your employees, the disclaimer and the default language.

'Users'
Here you can create, import, promote, demote and (de)activate users. It is best to invite users after configuring the rest of your company settings, so we will discuss this part last.

'Email settings'
Here you can set when the messenger will send out an email notification based on activity in the messenger.

'Theme'
Here you can set the colors of your messenger according to your wishes, so that it reflects the branding of your organization.

'Advanced'
You can customize the user experience of your co-workers further by setting the advanced settings. Here you can set whether using a mobile pin or two factor authentication is mandatory for all employees, or whether to show the contents of messages in mobile notifications and email notifications.

Messenger
info@messenger.com

New

Jane Doe

Company settings

Account   Users   Email settings   Theme   Advanced

You are seeing this page because you are a company administrator. It is possible to have more than one administrator within your organization. Modifications to the settings will apply to all users of the entire organization.
If you need help to get started with configuring your company account according to your wishes, feel free to download our company settings manual.

[View usage]   [Download company settings manual]

Company name
Messenger   [Save]

Accessibility in the messenger

Organization details

Street

Contact details

First name

Street number and suffix

Last name

Account

Listed under 'Account' you will find a number of general settings and data.

Usage
You can click 'View usage' to get a simple overview of the total amount of active users, the number of message sent and the amount of data storage that has been used. Below you will find this data for the past 30 days. You will not need to do anything with this right now, but when you have started using the messenger for real it can be a good idea to monitor this data periodically.

Company name
The next setting in the 'Account' category is the company name. What you fill in here will be shown at the top left corner of your screen.

Accessibility
Below 'Accessibility in the messenger' you can see a dropdown menu which enables you to set how accessible your team members will be in the messenger. In principle, every user can be invited by other users, even if they belong to other organizations.

Depending on how you wish to use the messenger (perhaps you will need to contact external specialists on a regular basis) you can make a choice for one of two options: to allow employees to be contacted by everyone or just by their co-workers.

Messenger
info@messenger.com

⊕ New

● Jane Doe ☰

Company settings

Account   Users   Email settings   Theme   Advanced

You are seeing this page because you are a company administrator. It is possible to have more than one administrator within your organization. Modifications to the settings will apply to all users of the entire organization.
If you need help to get started with configuring your company account according to your wishes, feel free to download our company settings manual.

[View usage]   [Download company settings manual]

Company name

[Messenger]   [Save]

Accessibility in the messenger

[▼]

Organization details

Street

[   ]

Street number and suffix

Contact details

First name

[   ]

Last name

Account – part 2

Organization details

During the registration process of the first person linked to an organization, the registrant will be prompted to enter the organization's details. These will be visible and can be edited by all admins, in the admin panel under the 'Account' tab.

Contact details

Under 'Contact details', the organization can designate a contact for all communication about the messenger. All admins will be able to see this person's details.

Messenger
info@messenger.com

New

● Jane Doe

Company settings

Account   Users   Email settings   Theme   Advanced

Organization details

Street

Street number and suffix

ZIP Code

City

Country

Choose your country

Phone number

Contact details

First name

Last name

Job title

Email address

Phone number

Save

Account – part 3

Company disclaimer
What you fill in here will be shown at the beginning of each company conversation as a disclaimer.

Login domain
Usually, new users are created based on a company email address. The domain of this email address is then used to link users to a company.

When not every team member has its own official company email address, these team members can use the messenger by means of the 'login domain'.

The login domain will usually simply be the name of the company – whenever you create a new user without providing an email address, this user can login with a username that is built up like this: 'logindomain\username'.

Messenger
info@messenger.com

New

Jane Doe

Company settings

Account   Users   Email settings   Theme   Advanced

Company Disclaimer

Save

If you want to create a new user without an email address, you can create a user with only a username. To make sure that this user is still listed under 'Co-workers', we use a so-called 'login domain'. This will usually be the company name - to sign in you can use the following "logindomain\username". You can set your preferred login domain below.

Login domain

Save

?

Account – part 4

Default language

The messenger is available in Dutch, English and German. Users can set their individual preference, but when you add new users to your company account you can also choose what language all new users initially see.

For most internationally orientated organizations, English will be the logical option.

Note: on mobile devices the default language is selected automatically, based on the language of the operating system of the mobile device.

Company domains

What if your organization uses multiple domains for the company email addresses – you will still want to have all your colleagues listed under the same company account. You can make this happen by adding all company domains that are in use under 'Company domains'.

If you are only using one domain name (the one with which you have registered) you can ignore this part.

Messenger
info@messenger.com

New

Jane Doe

Company settings

Account   Users   Email settings   Theme   Advanced

The default language sets the language of the web client for those users in your company who have not set their own language preferences yet.
The language that is used for mobile clients is based on the system language used on the mobile device in question.

Default language

Dutch

Company domains

Domains

messenger.com

Add company domain

Add

Account – part 5

Organization aliases
During the registration process, our system suggests a company to the registrant based on his/ her email address. When the new user becomes part of an existing organization, the other employees of this organization will be shown in his/her overview of co-workers.

However, some organizations are known by more than one name – think of, for example, a name that is fully written out versus an abbreviation. To make sure that all employees can easily find the organization they belong to during registration, the admin has the option to add 'organization aliases' – alternative names. That way, should a new registrant enter the abbreviation into the search function of the registration process rather the full name, he/she will still get a proper result back.

Messenger
info@messenger.com

New

Jane Doe

Company settings

Account   Users   Email settings   Theme   Advanced

Company domains

Domains

messenger.com

Add company domain

Add

Organization aliases

During the registration process, our system recommends currently active organizations to new users. If your organization is known by multiple names, you can add these names as aliases to make sure that your co-workers can easily find your organization.

Add organization alias

Add

Email settings

Depending on how much your organization plans to keep using email besides the messenger, you can set the frequency of the email notifications your team will receive according to your wishes. You can set this separately for every kind of messenger activity, though there are some that cannot be switched off (such as those emails linked to the registration process).

The default setting is that all email notifications are switched on.

It is also possible to change the contents of these email notifications. You can do this by clicking on 'Change template' on the right of the email you wish to edit.

Email settings – part 2

When you click 'Change template';, you will see an editor screen in which you can set the template language (this is by default the same as the company language), the subject line of the email and the title (the heading text in the email itself).

Below you will see a preview of the email as it is now – you can edit the body text of the mail by clicking on the 'Editor' option besides 'Preview'. Click 'Save' when you are done.

Theme

Under the theme tab you can change the colors of the messenger according to your wishes. You can choose to 'paint' the messenger in the colors of your organization.

At the top of the screen you can see three pre-set themes – feel free to use these if you find you are lacking inspiration.

Below you can see the adjustable colors. The 'background color' is the 'fixed' color of that component, the 'hover color' is the color the component has when you hover over it with your mouse and the 'select color' is the color a component gets when you have selected it (for example in the menu on the left side of your screen).

At the bottom you can see a preview of what your chosen colors will look like once you save your theme.

Click on "Remove theme" if you wish to return to the default color theme of your messenger.
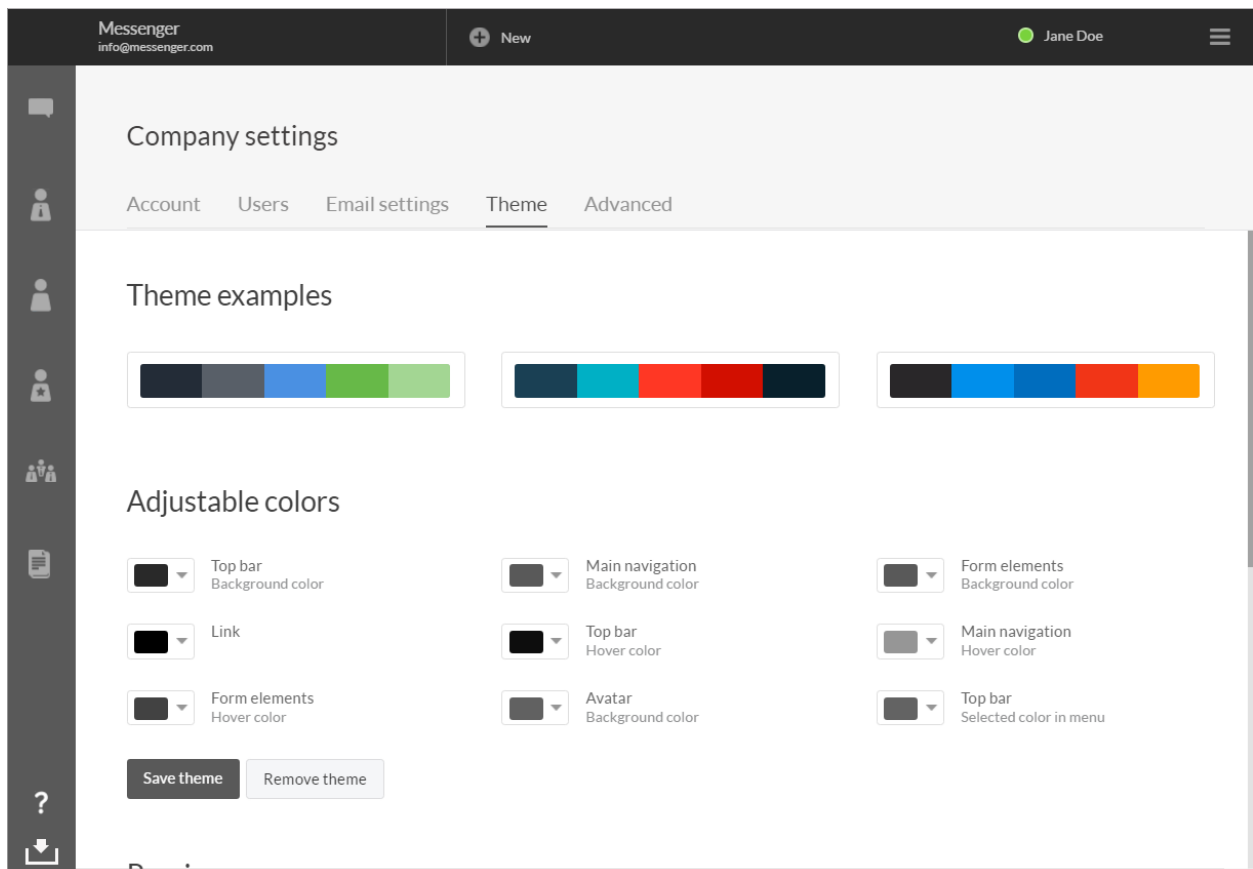
Advanced

Under the 'Advanced' tab you will find several security settings and other advanced options. Again, these settings will count for your entire team – you decide what functionalities your team will have access to and what advanced settings they are obliged to use.

At the top of the page you can see three buttons: 'Alternative sign in' (enabling you to log in using Single Sign-on), 'Applications' (for integrations with other software) and 'Alarm service' (for linking the messenger to, for example, the Ascom Myco). These three options will be discussed first, on the next few pages.

Advanced – part 2

Alternative sign in

When you clicked on 'Alternative sign in' and then click on 'Add provider' button, you will see the screen below. You also have the option to download an ADFS manual by clicking the button next to it.

If you wish to use multiple kinds of software at the same time, it can be handy to activate Single Sign-on. This means that after proper activation, you will only need to log in once to gain access to multiple applications on the network – including the messenger.

In order to achieve this, you will need the entity ID and the Provider Metadata XML from the main system of your organization – if you do not know what this is and where to find it, it would be best if you ask for assistance from your IT department.

Advanced – part 3

Applications

When you clicked on 'Applications' and then click on 'Create application' at the top right corner, you will see the screen below.

This page is for those who wish to create a software integration by means of the messenger's API documentation – usually, this will not you, as the company admin, meaning that you can ignore this page. Developers of software integrations will find the instructions necessary to proceed on the page itself – as such, we will not discuss it further in this manual.

Advanced – part 4

Alarm service

When you clicked on 'Alarm service' and then click on 'Setup alarm service' at the top right corner, you will see the screen below.

The settings on this page work together with the panic function available for the Android application of our messenger. On this page, you can set up a link with, for example, the Ascom Myco, to have alarm messages automatically forwarded to Ascom's alarm system. As such, this is a setting for those managing the alarm system of your organization.

Advanced – part 5

Invite on approved company domains only
As we explained in Account – part 4, admins can add company domains to a company account. Admins may choose to only allow people to join as co-workers when their email address is linked to one of these domains.

Pin login
You can give the application an extra layer of security by making it mandatory for your team to use a pin login code to access the messenger app on their (Android) smartphones.

Export chat
It can be handy to export chats as PDFs – this way, they can be easily archived (digitally or physically). Choose whether you want to provide your team with this functionality.

Creating a group chat by email
Depending on what parts the messenger and email will play in your organization, you can choose to make it possible to create a new group chat by sending an email.

Show message content (mobile)
If you wish to have absolutely no information visible outside of the messenger app, you can choose to not have the content of a message shown in mobile notifications.

Show message content (email)
If you wish to have absolutely no information visible outside of the messenger app, you can choose to not have the content of a message shown in email notifications.

Advanced – part 6

Like messages
The possibility to like messages is a nice little extra – decide whether you wish your team to have this option.

Delete messages
Being able to delete messages after sending them is very handy – this way you can easily delete little mistakes, which can prevent miscommunication. However, deleting messages can also go against company policies. Consider what will work best within your organization.

Two-factor authentication
Two-factor authentiction is an extra layer of security you can choose to make obligatory.

Your team will then nog only sign in with a username and password, but also with an authentication code generated by means of, for example, the Google Authenticator app.

Client access
By default, your co-workers will have access to all clients available for the messenger. You can choose to disable access to specific clients – to do so, simply click 'Disable' next to the client in question. Company admins will always be able to access all clients, because they need to be able to access the company settings and change them if necessary.

Users

Now that you have gone through all the previous steps, you will have prepared your messenger for your team! The next step is inviting all your co-workers.

Open the 'Users' tab. You will see three options at the top: 'Shared accounts' (for an overview of all shared accounts, more on this below), 'New user' (this is handy for adding a small number of contacts) and 'Import users' (for adding a large number of colleagues in one go).

We will discuss the options to add users first.

Users – part 2

Create new user

This option is pretty simple: fill in the form and the new user will receive an invite by email. Do make sure that you use his/her company email address (with the company domain name!).

By setting a password for this user you can make sure that this password adheres to the rules and regulations of your organization. You can also enter a mobile phone number to function as an extra form of authentication, so that upon registration the messenger will send an SMS token to the new user for verification purposes.

Users – part 3

Import users

You can import users by uploading a CSV, XLS or XLSX file.

It is handiest to enter the type of data at the top of every column – data that can be imported is: email address (mandatory), first name (mandatory), last name, phone number and password. Imported users will automatically become part of the company account – so do not use this option to invite external contacts!

Select your file – you will see that the messenger suggests what messenger field corresponds to which column in your file. Check whether these suggestions are correct and change them if necessary. You can also choose to start the import from a lower row in your file (make sure you exclude the row with column titles, for example). When ready, click on 'Import'.

Beware: if you have set a login domain under the 'Account' tab, the 'Email address' field becomes optional and an extra field is added: 'Username'.

Users – part 4

Managing users – options

If you navigate back to the main 'Users' tab now, you will see an overview of all your imported team members. These team members can now also be found under your regular 'Co-workers' tab, on the left of your screen.

You can also see two buttons next to each team member: an 'Options' button and an 'Edit' button. When you click on 'Options', a new row appears, showing more buttons. These will give you the option to reset the password or two-factor authentication of the user, to log out all his/her active clients, to give the user admin rights or to (de)activate the account.

You can click 'Edit' for more advanced changes.

Users – part 5

Managing users - edit

When you click on the 'Edit' button, you will see some general information about the user in question and, below that, the same options as you could access via the 'Options' button – and one more. This is the option to change the account selected into a so-called 'shared account'.

This basically means that multiple users will be able to access this account (they can switch accounts by clicking the company name and selecting an account from the drop-down menu which appears). This is especially handy for, for example, webcare accounts or other service accounts with lots of customer contact. When a certain employee has been communicating with a customer in the shared account but he/she is not present, another co-worker can take over the communication process using the same shared account.

Users – part 6

Below, the account of Jean Moreau has been marked as a 'shared account'. You can see that a new segment has appeared at the bottom: 'Shared account'. This will give you the option to link users to the shared account. All users you add here will be able to access the shared account and communicate in the name of the shared account.